

Anupa Khatiwoda

FINANCIAL ADVISOR- Financial Modeling, Portfolio Management Software, Risk Assessment

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📍 [Toronto](#)

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SKILLS

- **Financial Analysis & Data Analysis:** Financial statements, cost allocation, forecasting and Excel, SQL.
- **Regulatory Compliance:** KYC, regulatory reporting, Canadian taxation, tax rules, and remote monitoring.
- **Financial Planning and Advisory:** Financial modeling, portfolio management and investment strategies.
- **Insurance & Risk Management:** Underwriting, fraud detection, health, mortgage, Claims Handling.

WORK EXPERIENCE

Field Placement - Insurance Management

April 2024

Northbridge Financial Corporation

Hybrid, Toronto

- Collaborated with licensed professionals & observed client advisory techniques on coverage options and claims, enhancing client understanding 15%, supporting risk assessment, underwriting, and 5 policy recommendations.
- Conducted 3+ accident site investigations and client interviews with claims adjusters. Maintained documentation of client interactions, and incident reports using case management software to ensure regulatory compliance.
- Facilitated 8+ claims using risk mitigation tactics that improved decision-making 15% & customer service. Supported 5+ policy cases by observing advisory processes, 10% rise in client policy uptake during placement.

Accountant and Administrator

2019–2020, June 2021 – July 2022

Decode Genomics and Research Center

Nepal

- Prepared monthly, quarterly, and annual financial statements, contributing to accurate tax filing and compliance. And boosted report generation efficiency by 25% by streamlining processes and using tax optimization.
- Guided financial insights and cost analysis to stakeholders and clients, supporting decision-making and aligning financial strategies with client needs, which enhanced communication and elevated client satisfaction by 10%.
- Implemented internal controls to minimize risks and ensure compliance with tax regulations. Enhanced reporting accuracy by 20% through systematic documentation and analysis in MS Excel with advanced audit trails.

Academic Coordinator / Administrator

September 2020 – April 2021

London College of Global Education

Remote, Nepal

- Coordinated 5+ academic programs, executing, monitoring, and reviewing 100+ course deliverables and assessments in collaboration with program coordinators to meet milestones, improving program efficiency by 20%.
- Managed weekly progress reports, tracking departmental and personal targets. Achieved 100% completion of scheduled tasks, optimizing operations, and met program milestones with project tracking, and data analytics.
- Facilitated the preparation of 10+ resources and completion of 1000+ enrollment forms, ensuring seamless academic operations while securing the integrity of student data in compliance with institution's standard protocols.

Intern (Co-op)

June 2018 – July 2020

Agricultural Development Bank LTD, Nepal

Nepal

- Maintained 500+ customer files, opening 200+ accounts, 1000+ KYC & CKYC updated, streamlining client on-boarding processes by integrating automated verification systems, document management and data security.
- Delivered financial guidance, education on diversified savings plans and insurance products, leveraging portfolio optimization, risk mitigation strategies, compliance standards, which strengthened product adoption by 10%.
- Liaised with cross-functional teams to streamline operational flow, achieving daily and weekly targets and while contributing to a 15% improvement in bank performance via data sharing, reconciliation, and process alignment.

PROJECT EXPERIENCE

Banking Operations and Services

April 2024

Research Report, Agricultural Development Bank, Nepal

- Researched banking practices, conducted SWOT analysis, noted 3 key improvement areas, recommended changes.

EDUCATION

Insurance Management

September 2023 – April 2024

Centennial College, Ontario

Financial Planning

January 2023 – August 2023

Centennial College, Ontario

Bachelor of Business Administration (BBA)

August 2014 – July 2018

Tribhuvan University, Nepal

Certifications

- Canadian Securities Course, SAP Professional Fundamentals, QuickBooks Online– ProAdvisor
- Chartered Professional Accountant (CPA) – Planned Enrollment
- LLQP (Life License Qualification Program) – Willing to Complete